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eRequisition Catalog Item Process Guide

This process guide provides instruction on the functional steps to create an eRequisition containing a catalog item. For NC E-Procurement, an eRequisition is a requisition that is created electronically using the Ariba system. If an item appears in the catalog, it signifies that that item is part of a Statewide Term Contract with the State of North Carolina.

I. Create an eRequisition

An eRequisition is created when a user selects items to order in NC E-Procurement. The user initiating the requisition is referred to as the requester. There are two main steps required to create an eRequisition:

1. **Add Items** – Select and add items to the shopping cart.
2. **Summary** – Enter title, shipping, accounting, comment, and attachment information, as well as review the eRequisition for accuracy.

The Ariba Dashboard, shown below, is the first page displayed once a user logs into NC E-Procurement. To begin an eRequisition, click the **'eRequisition'** link in the **'Common Actions'** Portlet, or click **'Create'** on the Menu Bar and then select **'eRequisition.'**

The screenshot shows the Ariba Home Dashboard. At the top, there is a navigation bar with 'Create', 'Search', 'Manage', and 'Preferences' options. The 'Create' option is circled in red. Below the navigation bar, the 'Home Dashboard' is displayed. On the left, there is a 'Common Actions' portlet with a 'Create eRequisition' link circled in red. Other links in this portlet include 'Manage', 'Receive', and 'Reports'. Below this is a 'Recently Viewed' portlet and a 'Purchasing Links' portlet. On the right, there are several other portlets: 'To Do' (empty table), 'Search' (with a search bar and 'eRequisition' link), 'News' (with a welcome message and training resources), and 'My Documents' (empty table). The top right corner of the dashboard shows 'Home | Help * | Logout' and 'Welcome NCASRequester NCASRequester'.

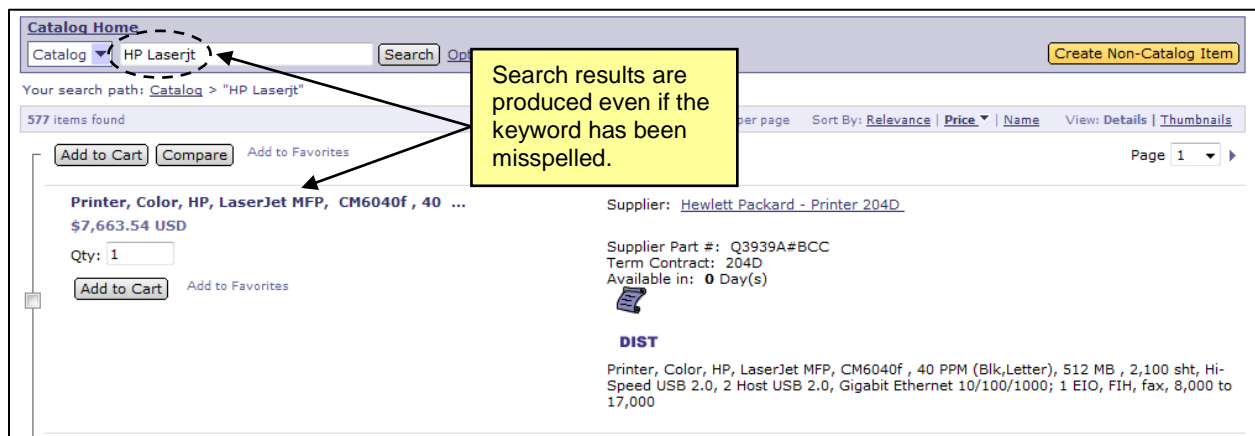
II. Add Items

Users may add catalog (Statewide Term Contract) items to their eRequisition by utilizing the catalog search functionality. From the **'Catalog Home'** page, a user can also navigate to the Punchout catalogs, as well as choose to create a non-catalog item. Punchout and non-catalog requisitioning processes are covered in separate process guides.

Users can search the catalog using several methods. In addition to being able to browse the catalog by clicking a Supplier Name or Category, users can click **'Options'** to view additional search field options.

1. Keywords (e.g., pen) may be entered in the first free-text field to the left of the **'Search'** button.

Note: The keyword search field is intuitive and incorporates approximate string matching for user entries (e.g., even if a keyword is misspelled, the system will still produce search results).



2. **Supplier Part #:** If a user knows the Supplier Part Number of the item for which they are searching, they may enter it here.
3. **Manufacturer Part #:** If the user knows the Manufacturer Part Number of the item for which they are searching, they may enter it here.
4. **Contract ID:** Enter the specific State of NC Statewide Term Contract ID here to search for all catalog items on a specific Statewide Term Contract. A list of Contract IDs may be found at <http://www.pandc.nc.gov/numlistt.aspx>.
5. **Commodity Codes:** The National Institute of Government Purchasing (NIGP) provides a standardized list of Commodity Codes. Commodity Codes provide a means for classifying goods and services to promote purchasing efficiency. A list of Commodity Codes and the goods/services they represent may be found at <http://www.pandc.nc.gov/ipsalpha.htm>

6. Enter the desired search criteria and click the **'Search'** button.



The screenshot shows the NCE-Procurement eRequisitioning interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' options. Below this, there are tabs for 'Create', 'Search', 'Manage', and 'Preferences'. The main content area displays a requisition titled 'RQ16972808: Untitled Requisition' with a total value of '\$0.00000 USD'. A search bar contains the text 'Stapler' and a 'Search' button. A callout box points to the 'Options' button next to the search bar, stating: 'Clicking **'Options'** will allow users to customize their catalog search.' Below the search bar, there are fields for 'Supplier Part #', 'Manufacturer Part #', 'Contract ID', and 'Commodity Code'. A 'Catalog Home' section is visible, showing a grid of catalog categories with icons and counts, such as 'AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (2685)', 'MEDICAL & LAB EQUIPMENT & SUPPLIES (4448)', 'OFFICE EQUIPMENT & SUPPLIES/PAPER/PRINTING (4649)', 'POLICE & SAFETY EQUIPMENT (320)', and 'TECHNOLOGY ITEMS (11982)'. A callout box points to the 'Supplier' column in this grid, stating: 'Browse the catalog by clicking a Supplier Name or a Category.' On the left side of the interface, there is a 'Supplier' list with various supplier names and their respective item counts, such as '9 to 5 Seating (506)', 'Abco Office ... (129)', and 'AMERICAN SEATING ... (1)'. The interface also includes a 'Summary' button and an 'Exit' button in the top right corner.

After conducting a search, the results page will be displayed. It will provide further options for refining the search and evaluating the results.

7. The Catalog Navigation Panel will provide options to allow users to refine results. Those options will automatically appear and are dependent on the search results. Select an option from this menu to see only those results matching the specified criteria.
8. **'Your search path'** displays the trail of the current search. Click any of the links to move back through the trail.

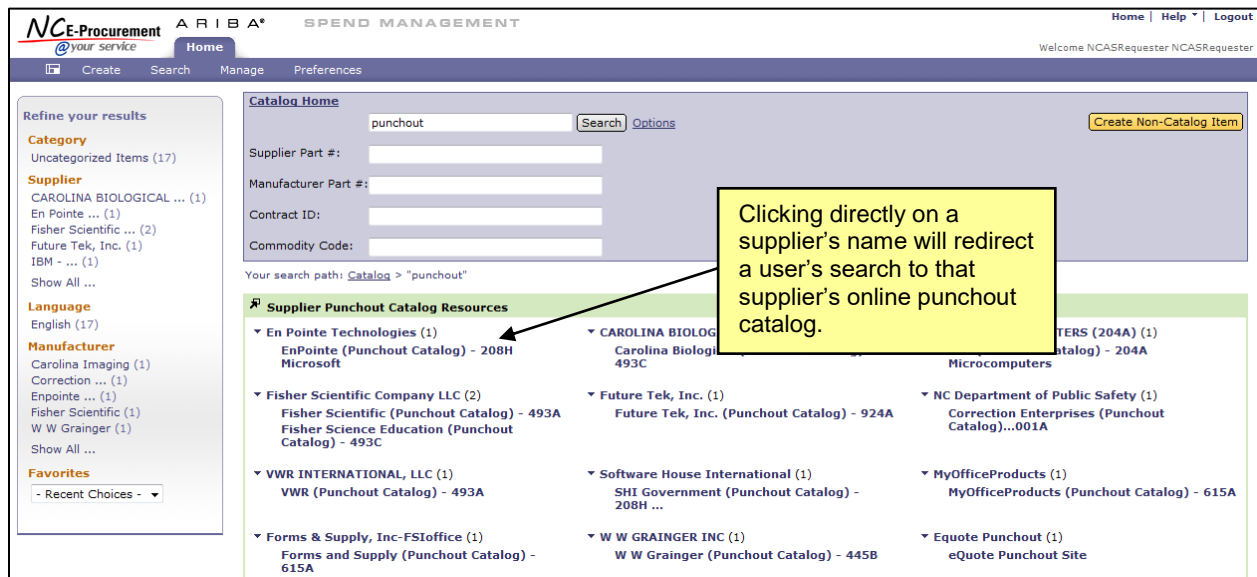


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9. Clicking a link next to **'Sort By'** allows users to sort the search results based on **Relevance, Price, or Name.**
 - a. **Relevance** places the items with the best or most complete match near the top.
 - b. **Price** places the least expensive items closer to the top.
 - c. **Name** sorts the list alphabetically by name.

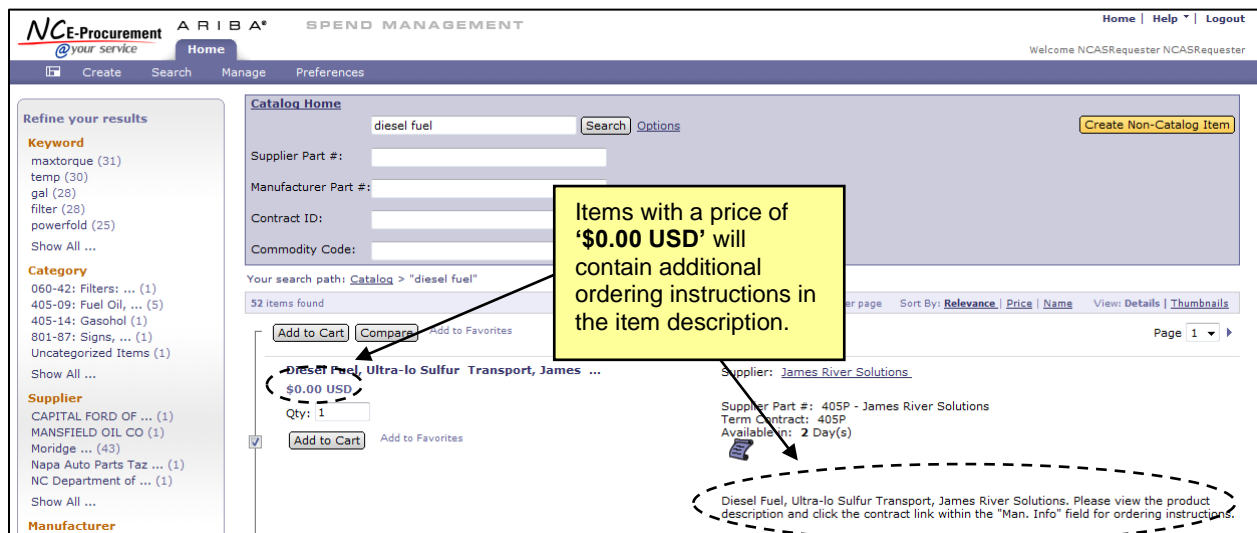
The screenshot displays the ARIBA SPEND MANAGEMENT interface. On the left, a sidebar titled 'Refine your results' lists filters for Keyword, Category, and Supplier. The main content area shows a search for 'pen' with a search path of 'Catalog > "pen"'. A yellow callout box points to the search path with the text: 'Clicking a link in the search path allows users to move back through the search trail.' Below the search path, there are sections for 'Supplier Punchout Catalog Resources' and a list of search results. The first result is 'SVC-PB-SE-00001 Mobile Armor- Deployment Engineer ...' with a price of \$200.00 USD. The second result is 'Award, 5 Year, Ballpoint pen has a click-top and ...' with a price of \$9.59 USD. The 'Sort By' dropdown is set to 'Relevance'.

10. Users who want to select items from a Supplier Punchout Catalog may enter the name of the supplier in the keyword field or type 'punchout' to view a complete list of **'Supplier Punchout Catalog Resources.'** Click the supplier's name to directly access the supplier's online catalog for the Statewide Term Contract. For additional information on ordering from punchout catalogs, please refer to the 'eRequisition Punchout Item Process Guide.'



The screenshot shows the NCE-Procurement website interface. The search bar contains the keyword 'punchout'. Below the search bar, there are fields for Supplier Part #, Manufacturer Part #, Contract ID, and Commodity Code. A callout box with a yellow background and black border points to a list of 'Supplier Punchout Catalog Resources'. The callout text reads: 'Clicking directly on a supplier's name will redirect a user's search to that supplier's online punchout catalog.' The list includes suppliers such as En Pointe Technologies, Fisher Scientific Company LLC, VWR International, and others, each with a link to their respective punchout catalog.

11. Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of **'\$0.00 USD'** and will contain the necessary steps in the item description. Users should refer to those instructions when adding this type of item to their eRequisition.



The screenshot shows the NCE-Procurement website interface. The search bar contains the keyword 'diesel fuel'. Below the search bar, there are fields for Supplier Part #, Manufacturer Part #, Contract ID, and Commodity Code. A callout box with a yellow background and black border points to a list of search results. The callout text reads: 'Items with a price of '\$0.00 USD' will contain additional ordering instructions in the item description.' The list includes an item for 'Diesel Fuel, Ultra-lo Sulfur Transport, James River Solutions' with a price of '\$0.00 USD'. A callout box points to the item description, which contains the text: 'Diesel Fuel, Ultra-lo Sulfur Transport, James River Solutions. Please view the product description and click the contract link within the "Man. Info" field for ordering instructions.'

Note: There are several icons that may be displayed on a catalog line item that indicate additional information about the item or supplier.

12. The **Scroll Icon** indicates that a PDF version of the contract is available for viewing. Click the **Scroll Icon** to see the Contract.

Note: The PDF file will open in a pop-up window. Pop-up window blockers must be turned off to allow the window to appear. Adobe® Reader® is required to view PDF files. Adobe® Reader® is available for free download at <http://get.adobe.com/reader/>.

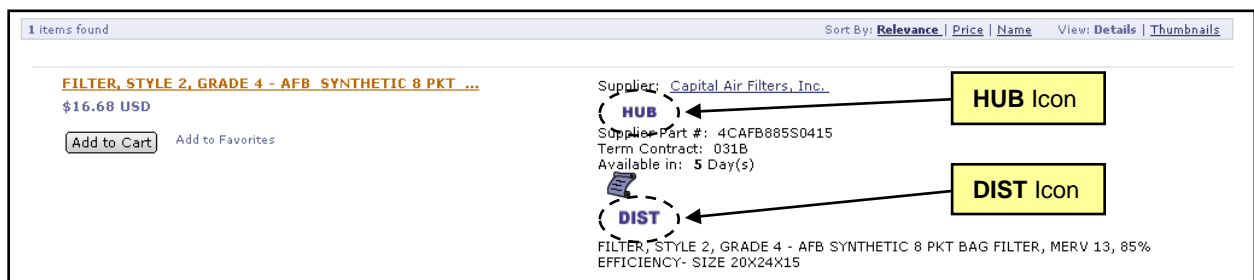
13. The **Recycled Content Icon** indicates that the item is made from recycled materials.



14. The **DIST Icon** indicates that an item is supplied by a distributor. Once the item is added to the shopping cart, users will need to select the appropriate distributor through the **'Supplier'** field.

15. The **HUB Icon** indicates that the item is supplied by a registered Historically Underutilized Business (HUB).

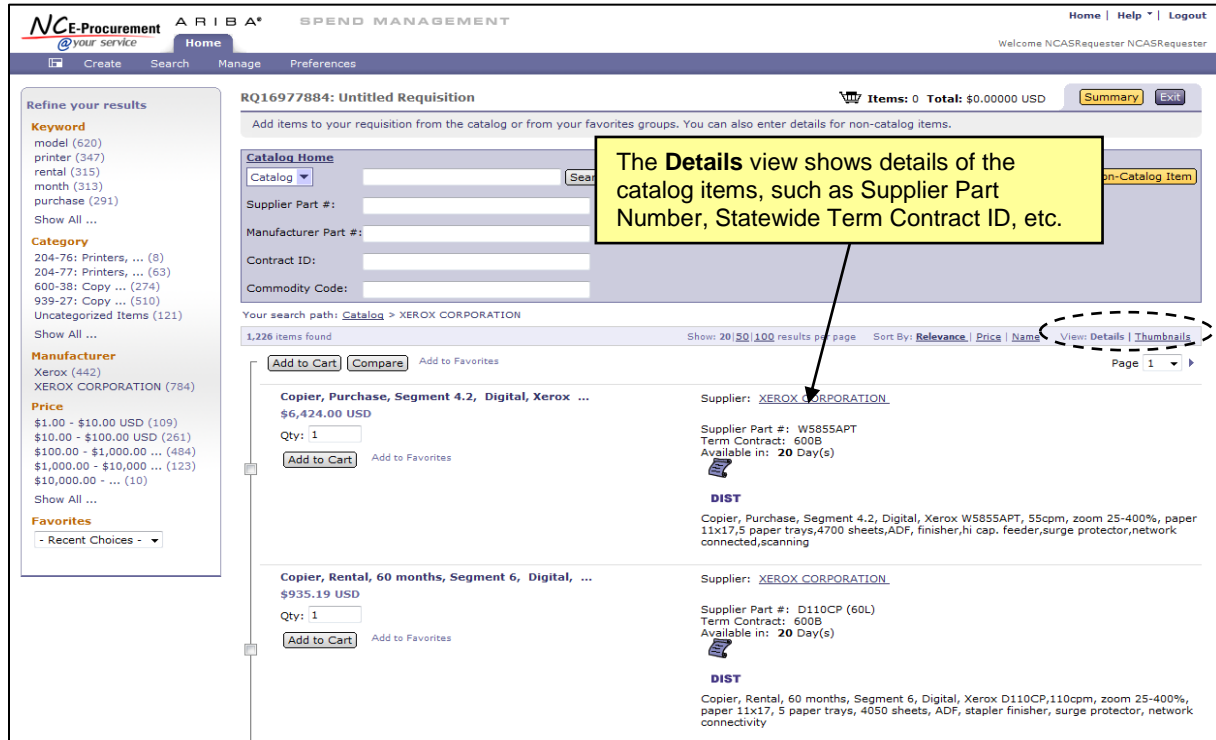
Note: North Carolina E-Procurement receives vendor HUB certification status directly from the Office for Historically Underutilized Businesses ...



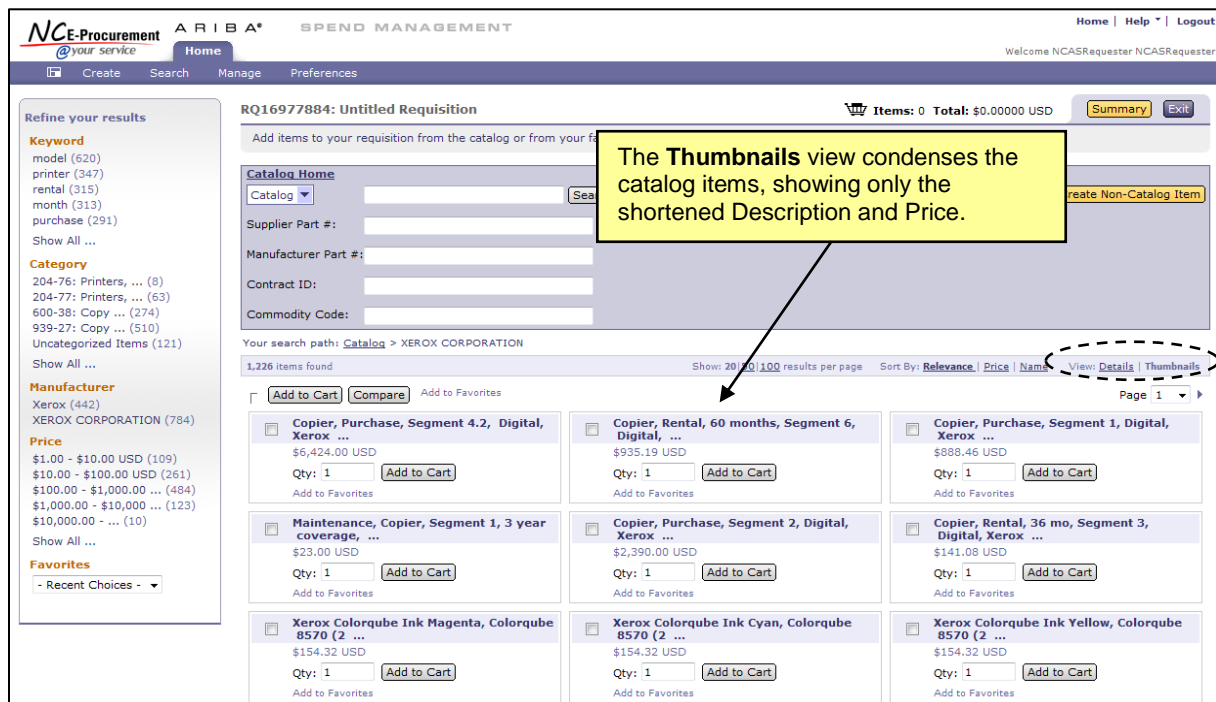
16. To view detailed supplier information, click the underlined supplier name link. The **'Review Details for Supplier'** screen will appear. Click **'Done'** to return to the search results.



17. Using the 'View' options, the user can choose whether to view the item in a more detailed view ('Details') or as a Thumbnail view ('Thumbnails').



The **Details** view shows details of the catalog items, such as Supplier Part Number, Statewide Term Contract ID, etc.



The **Thumbnails** view condenses the catalog items, showing only the shortened Description and Price.

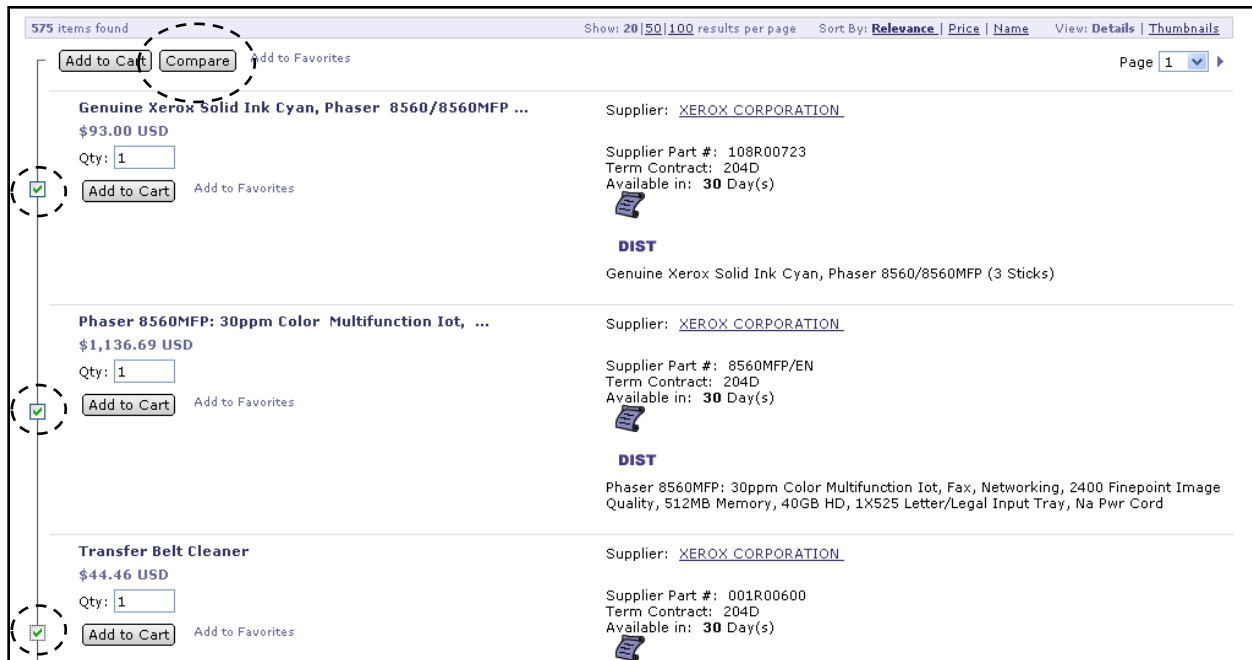


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18. Users can add items to an eRequisition at any time by checking the box next to the desired item and clicking the **'Add to Cart'** button next to that item. To add multiple items, check the box next to more than one item and then click **'Add to Cart'** at the top of the search results.

The screenshot shows the NCE-Procurement eRequisitioning interface. The top navigation bar includes 'Home', 'Help', and 'Logout'. The main content area displays search results for 'OFFICE EQUIPMENT & SUPPLIES/PAPER/ ...'. A list of results is shown, including 'Calculator, Hand Held, Basic, Sharp, EL-240SB' and 'Teacher Kit, Calculator, Hand Held, Fraction'. Each item has a checkbox and an 'Add to Cart' button. A yellow callout box with a black border contains the text: 'To add multiple items, users may check the box next to the chosen items and click **'Add to Cart'** at the top of the search results. To add a single item, users may click **'Add to Cart'** on the individual item description.' The callout box points to the 'Add to Cart' button at the top of the search results and the checkboxes for the first two items.

19. Two or more items can be compared side by side to quickly review the attributes of those items. Check the boxes next to the items to be compared and click the **'Compare'** button.



575 items found | Show: 20 | 50 | 100 results per page | Sort By: Relevance | Price | Name | View: Details | Thumbnails | Page 1

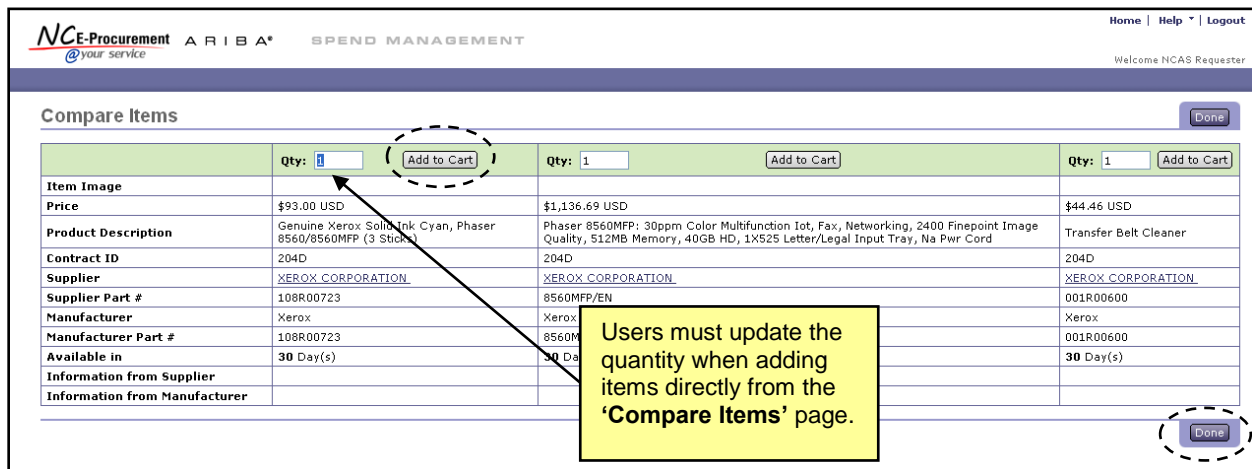
Genuine Xerox Solid Ink Cyan, Phaser 8560/8560MFP ...
\$93.00 USD
Qty: 1
Add to Cart | Add to Favorites

Phaser 8560MFP: 30ppm Color Multifunction Iot, ...
\$1,136.69 USD
Qty: 1
Add to Cart | Add to Favorites

Transfer Belt Cleaner
\$44.46 USD
Qty: 1
Add to Cart | Add to Favorites

20. The **'Compare Items'** page will be displayed. Once the information has been reviewed, click **'Done'** to return to the search results.

21. In order to add items directly from the **'Compare Items'** page, update the quantity for the desired item and click **'Add to Cart.'**



NC E-Procurement @ your service | A R I B A * | SPEND MANAGEMENT | Home | Help * | Logout | Welcome NCAS Requester

Compare Items | Done

	Qty: 1	Add to Cart	Qty: 1	Add to Cart	Qty: 1	Add to Cart
Item Image						
Price	\$93.00 USD		\$1,136.69 USD		\$44.46 USD	
Product Description	Genuine Xerox Solid Ink Cyan, Phaser 8560/8560MFP (3 Sticks)		Phaser 8560MFP: 30ppm Color Multifunction Iot, Fax, Networking, 2400 Finepoint Image Quality, 512MB Memory, 40GB HD, 1X525 Letter/Legal Input Tray, Na Pwr Cord		Transfer Belt Cleaner	
Contract ID	204D		204D		204D	
Supplier	XEROX CORPORATION		XEROX CORPORATION		XEROX CORPORATION	
Supplier Part #	108R00723		8560MFP/EN		001R00600	
Manufacturer	Xerox		Xerox		Xerox	
Manufacturer Part #	108R00723		8560M		001R00600	
Available in	30 Day(s)		30 Da		30 Day(s)	
Information from Supplier						
Information from Manufacturer						

Users must update the quantity when adding items directly from the **'Compare Items'** page.

Done



22. Once 'Add to Cart' is selected, the 'Summary' page will be displayed and the selected item(s) will display on the eRequisition.
23. More items can be added to the eRequisition at this point by clicking 'Add from Catalog' or 'Add Non-Catalog Item.'

Note: Users may see a more detailed view on the 'Summary' page by clicking 'Show Details.'

Users may expand the details of a line item by clicking 'Show Details.'

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Xerox Colorqube Ink Cyan, Colorqube 8870 (6 Sticks)	108R00950	1	each	\$0.00 USD	\$0.00 USD	\$92.89 USD	\$92.89000 USD

Total Cost: \$92.89000 USD

24. After a catalog item has been added to an eRequisition, users may see more information about a supplier by clicking on the supplier's name in the detailed view.

Users may click directly on the supplier's name in the 'Show Details' view to see more detailed information about the supplier.

Contract ID: 204D
Supplier: XEROX CORPORATION
Location: 600B Copier&Supply Orders Only
Commodity Code: 207-72 - Printer Accessories...

DIST
Bid Number: ITS-006500 - Printers and Peripherals



Note: The 'Review Details for Supplier' page appears, showing users additional details about a supplier including the supplier locations.

Note: Users may click on one of the supplier's locations to view even more information, such as the address, contact name, and preferred ordering method.

Supplier Name: XEROX CORPORATION
 Corp website: <http://www.xerox.com>
 Locations: [XEROX - All Orders Except 204D](#), [Xerox - Supplies Orders Only](#), [Xerox Direct](#), [Xerox Corp Reseller 204D Orde](#)
 HUB Category: None
 HUB Status: None
 Company Information: (no value)

25. Click 'Done' to return to the eRequisition 'Summary' page.

Name: XEROX - All Orders Except 204D
 Address: 123 Main St.
 Anytown, NC 27609
 United States
 Contact: Theresa Liuzzo
 Email Address: nc_supplier@yahoo.com
 Phone: 704-551-2199
 Fax: 19198502866
 Preferred Ordering Method: Email

26. Click 'Catalog Home' to clear the search results and return to the initial Catalog Search page.

Supplier: B.W.Wilson Paper Co. (6), CLARCOR Air ... (268), D & H DISTRIBUTING ... (30), LEXMARK ... (1142), LRC, INC (39), Show All ...
 Language: English (22593)
 Favorites: - Recent Choices -

AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (1557)
 AGRICULTURAL EQUIPMENT AND SUPPLIES (1180)
 CHEMICALS (377)

MEDICAL & LAB EQUIPMENT & SUPPLIES (142)
 LABORATORY EQUIPMENT AND SUPPLIES (58)
 MEDICAL EQUIPMENT AND SUPPLIES (84)

APPLIANCES, ELECTRICAL, CLOCKS (10169)
 APPLIANCES (3055)
 ELECTRICAL EQUIPMENT (7114)

OFFICE EQUIPMENT & SUPPLIES/PAPER /PRINTING (3042)
 OFFICE EQUIPMENT AND SUPPLIES (2827)
 PAPER AND PAPER PRODUCTS/PLASTICS (61)



III. Summary

The **'Summary'** page allows the user to enter a title as well as shipping, comment, and attachment information. It also allows the user to review the eRequisition for accuracy. The approval flow for the eRequisition can be viewed from the **'Approval Flow'** Tab on the **'Summary'** page as well.

1. Once on the **'Summary'** page, users can enter a title for the eRequisition. The title should be descriptive of the items being purchased and can be used to make the eRequisition easily identifiable.
2. The **'Pre-Encumbrance Status'** appears for NCAS users only and indicates the pre-encumbrance status of the eRequisition in NCAS. The field remains populated with **'Not Encumbered'** until the eRequisition has been sent to NCAS to pre-encumber the designated amount.

Note: Once a user submits the eRequisition, the information is sent to NCAS to pre-encumber the designated amount of the purchase order. The **'Pre-Encumbrance Status'** reflects when the eRequisition has been pre-encumbered. When the eRequisition becomes a purchase order, the money will be fully encumbered in NCAS.

3. The **'On Behalf Of'** field will default to the requester's name. To create an eRequisition on behalf of another user, use the **'On Behalf Of'** drop-down menu and select that user's name. If the user does not appear in the drop-down menu, select **'Search for more...'** and search for the user in the pop-up window that appears.
4. The **'Delay Purchase Until'** field, visible for NCAS and Non-Integrated users only, allows the eRequisition to be submitted and approved but not be distributed to the supplier until the date specified.

Note: Funds will not be encumbered in NCAS until the date specified in the **'Delay Purchase Until'** field and a purchase order is successfully created with a status of **'Ordered.'**

5. The **'Buying Entity'** field, visible for NCAS users only, will default to the buying entity that is selected in the user's profile. It can be updated using the **'Buying Entity'** drop-down menu. If the desired buying entity does not appear in the drop-down menu, select **'Search for more...'** and search for the desired buying entity.
6. The **'Transmit to Supplier'** field, visible for NCAS and Community College users only, defaults to checked, meaning that the purchase order, when created, will be sent to the supplier. If the box is unchecked the supplier will **not** receive a copy of the purchase order.

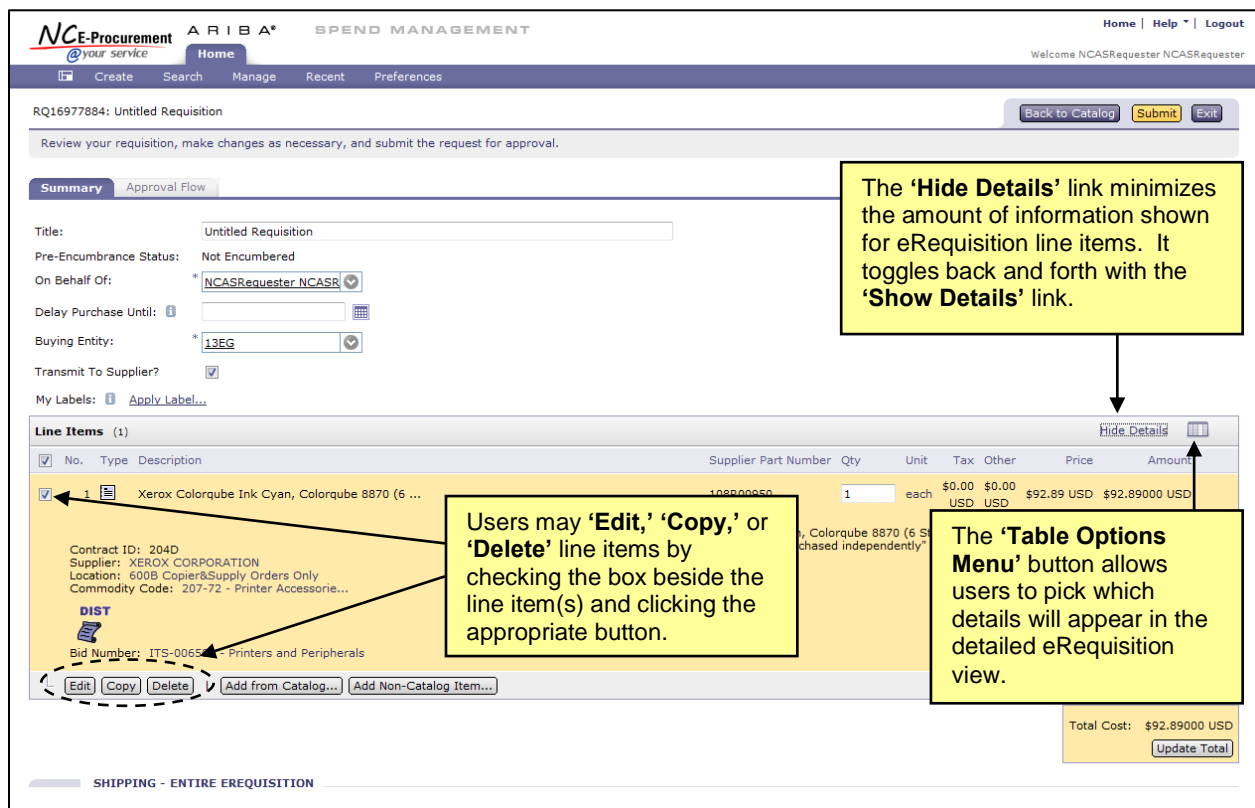
The screenshot shows the 'Summary' tab of an eRequisition form. The fields are as follows:

- Title:** A text input field with a placeholder: "The title of the eRequisition may be entered in this field".
- Pre-Encumbrance Status:** A dropdown menu currently set to "Not Encumbered".
- On Behalf Of:** A dropdown menu currently set to "NCAS Requester".
- Delay Purchase Until:** A date selection field with a calendar icon.
- Buying Entity:** A dropdown menu currently set to "41EG".
- Transmit To Supplier?:** A checkbox that is checked, circled in red in the image.
- My Labels:** A link labeled "Apply Label...".

- While on the **'Summary'** page, users may review the eRequisition line items prior to submitting the eRequisition. Line items can be edited, copied, and/or deleted directly from this page by checking the box next to the line item and clicking the appropriate button. See the 'Editing Line Items' process guide for additional information regarding those processes.

Note: Click the **'Hide Details'** link to minimize the amount of information that is shown for each line item. Once the **'Hide Details'** link has been selected, the requisition details will remain hidden until the user changes their default preference or clicks the **'Show Details'** link.

Note: The small button next to the **'Hide Details'** link opens the **'Table Options Menu'** and can be used to select exactly what information is displayed for each line item.



The screenshot shows the 'Summary' page for requisition RQ16977884. The page includes a header with 'NCE-Procurement @your service' and 'SPEND MANAGEMENT'. Below the header, there are navigation tabs for 'Summary' and 'Approval Flow'. The main content area displays requisition details such as Title, Pre-Encumbrance Status, On Behalf Of, and Buying Entity. A table of 'Line Items' is shown below, with one item selected. The 'Hide Details' link and the 'Table Options Menu' button are highlighted with callouts. The 'Table Options Menu' button is a small icon next to the 'Hide Details' link.

The 'Hide Details' link minimizes the amount of information shown for eRequisition line items. It toggles back and forth with the 'Show Details' link.

Users may 'Edit,' 'Copy,' or 'Delete' line items by checking the box beside the line item(s) and clicking the appropriate button.

The 'Table Options Menu' button allows users to pick which details will appear in the detailed eRequisition view.

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Xerox Colorqube Ink Cyan, Colorqube 8870 (6 ...	108800050	1	each	\$0.00	\$0.00	\$92.89 USD	\$92.89000 USD

Total Cost: \$92.89000 USD
Update Total



8. The **'Shipping – Entire eRequisition'** section at the header level should be populated according to where and to whom the items on the eRequisition should be shipped. Shipping preferences entered here will default on the entire eRequisition unless a user has entered unique values on certain line items.

Note: Shipping preferences for single lines may be set by editing the line item individually. These edits will remain in place even if the user changes an overall setting on the **'Summary'** page.

9. The **'Ship To'** field automatically defaults to the ship to location set up in the user's profile. Users may choose a different option by selecting **'Search for more...'** from the drop-down menu.

Note: The **'Ship To'** drop-down menu contains the ship-to addresses that have been entered by an administrator. These addresses are agency specific.

10. The **'Deliver To'** field indicates the recipient of the order. This is a free-text field that defaults to the requester's name. The default value can be deleted, and the field can be populated with any value.

11. The **'Need-by Date'** field is transmitted on the purchase order to the supplier as the date by which the items need to be delivered. The calendar icon next to the field may be used to select the appropriate date.

12. The **'Shipping Method'** field describes the method by which items will be shipped to the buyer and defaults to **'BEST WAY'** for both NCAS Agencies and EP Lite Agencies. This field can be changed by selecting **'Search for more...'** from the drop-down menu.

13. The **'Freight on Board (FOB) Code'** reflects how freight charges for the order are paid. This value defaults to **'001'** for NCAS Agencies and **'Destination'** for EP Lite Agencies. Using the drop-down menu, users may select **'Search for more...'** to find the option that best meets the user's agency purchasing policies.

14. The **'Terms of Payment'** field describes the timelines and conditions of payment to the vendor and defaults to **'N30'** for both NCAS Agencies and EP Lite Agencies. Using the drop-down menu, users may select **'Search for more...'** to find the option that best meets the user's agency purchasing policies.

SHIPPING - ENTIRE EREQUISITION

Ship To: * NCAS Ship To

Deliver To: * NCAS Requester

Need-by Date: [Calendar Icon] [Text Field]

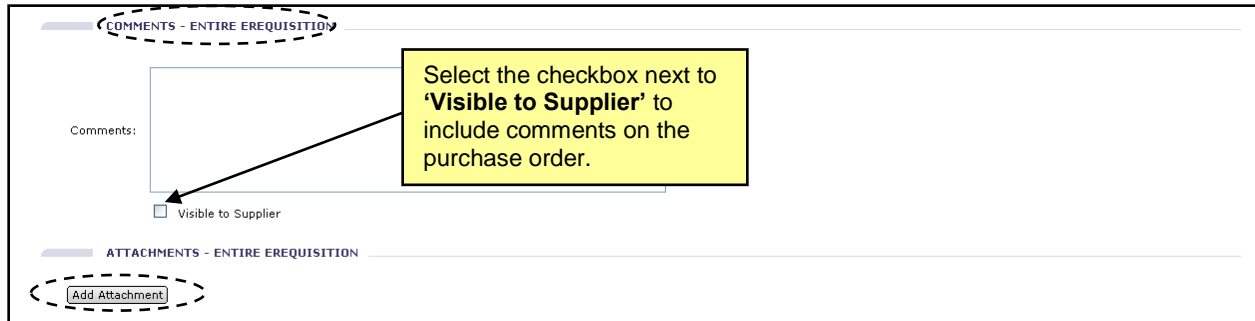
Shipping Method: * BEST WAY

FOB Code: * 001

Terms of Payment: * N30

15. Comments may be added for the entire eRequisition using the **'Comments – Entire eRequisition'** field. The requester may add only one comment at the header level of the eRequisition. If more comments are needed, they may be added either at the line item level or at the header level by approvers of the eRequisition.

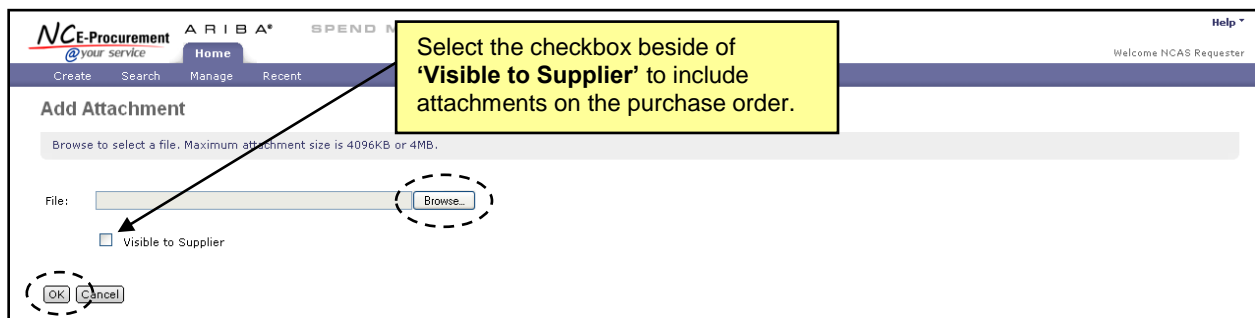
16. Attachments may be added to the eRequisition at the header level by clicking the **'Add Attachment'** button.



17. The **'Add Attachment'** page is displayed after the **'Add Attachment'** button has been clicked at the header level on the **'Summary'** page. Click the **'Browse'** button to locate and select an attachment, then click **'OK'** once the attachment is selected to populate the **'File'** field.

Note: The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .dotx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xltx, .xml, and .zip

Note: The maximum file size for attachments is 5MB. Adding more than 10MB of total attachments may cause a delay when sending purchase orders to vendors who receive their orders via the Ariba Supplier Network (ASN), and adding more than 5MB of total attachments may cause a delay when sending purchase orders to vendors who receive their orders via email.

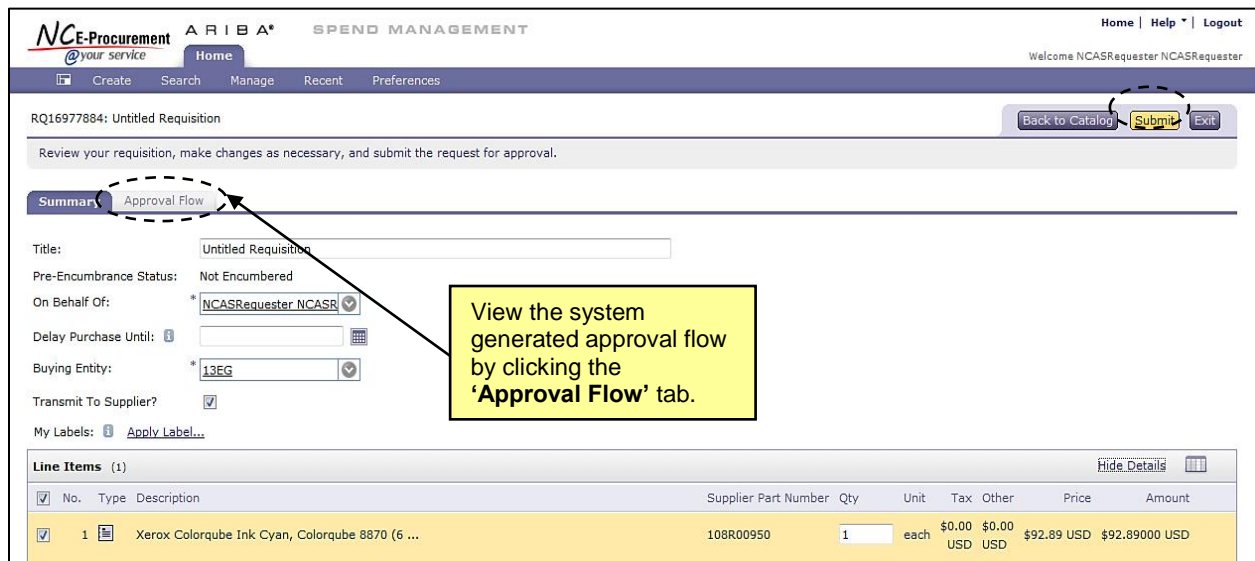


18. Once an attachment has been added to an eRequisition, the user can add more attachments by clicking the **'Add Attachment'** button again. Users may also change an existing attachment's visibility to the supplier by checking or unchecking the **'Visible to Supplier'** checkbox. Finally, users may delete unwanted attachments by clicking the corresponding **'Delete'** button.

ATTACHMENTS - ENTIRE EREQUISITION				
Attachments				
File Name ↑	Size	Creator	Visible to Supplier	
A Guide to Vendor Registration.pdf Download	725.2 KB	NCAS Requester	<input type="checkbox"/>	Delete
Add Attachment				

19. The system generated approval flow can be reviewed by clicking the **'Approval Flow'** tab. For more information regarding approval flows, see the 'Approving an eRequisition' process guide.

20. To submit the eRequisition to be reviewed and approved by the approval flow, click the **'Submit'** button either at the top of the bottom of the page.



The screenshot shows the 'Approval Flow' tab selected in the 'RQ16977884: Untitled Requisition' page. A yellow callout box with a black border contains the text: "View the system generated approval flow by clicking the 'Approval Flow' tab." The page includes a header with the NCE-Procurement logo and navigation links, a main content area with a form for requisition details, and a table of line items at the bottom.

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Xerox Colorqube Ink Cyan, Colorqube 8870 (6 ...	108R00950	1	each	\$0.00 USD	\$0.00 USD	\$92.89 USD	\$92.89000 USD

IV. Catalog Item Kits

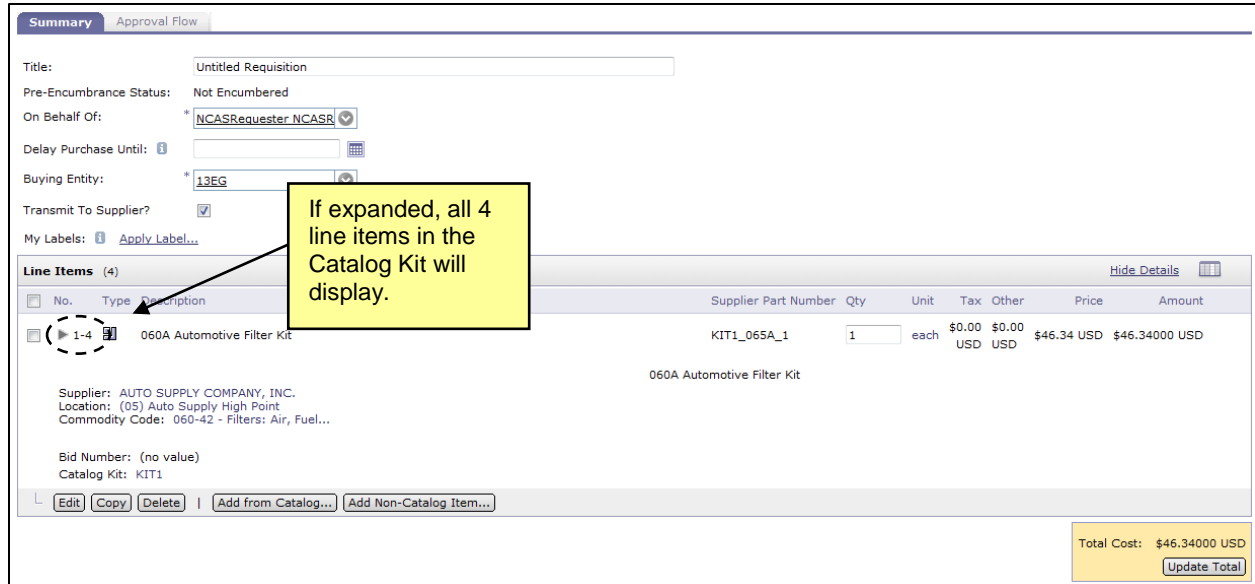
Catalog Kits are items in NC E-Procurement that are bundled together by the supplier into one unit, such as items that are typically ordered for new employees. When ordered from the catalog, users will order a Catalog Kit as one item. However, the Catalog Kit might appear in the eRequisition as a list of separate items.

1. Catalog Kit items can be located by performing a keyword search for the Catalog Kit name.
2. The returned search results will display the Catalog Kit name and will have a **Catalog Kit Icon** displayed to indicate that the item is a Catalog Kit.
3. To add the Catalog Kit Item to the eRequisition, click **'Add to Cart'** next to the desired kit.

Note: The entire Catalog Kit will be added to the eRequisition initially. Once added, users can then make edits to the Catalog Kit, including the deletion of certain items. Catalog Kit items that are required cannot be deleted.

4. When first added to the eRequisition, the Catalog Kit will appear as one compressed line item, but all the line numbers will be indicated (i.e. 1 – 4).

- Click the arrow next to the compressed line item to view all lines associated with the Catalog Kit.



Summary Approval Flow

Title: Untitled Requisition

Pre-Encumbrance Status: Not Encumbered

On Behalf Of: *NCASRequester NCASR

Delay Purchase Until: [Calendar Icon]

Buying Entity: *13EG

Transmit To Supplier?

My Labels: [Apply Label...](#)

Line Items (4) [Hide Details](#)

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1-4		060A Automotive Filter Kit	KIT1_065A_1	1	each	\$0.00 USD	\$0.00 USD	\$46.34 USD	\$46.34000 USD

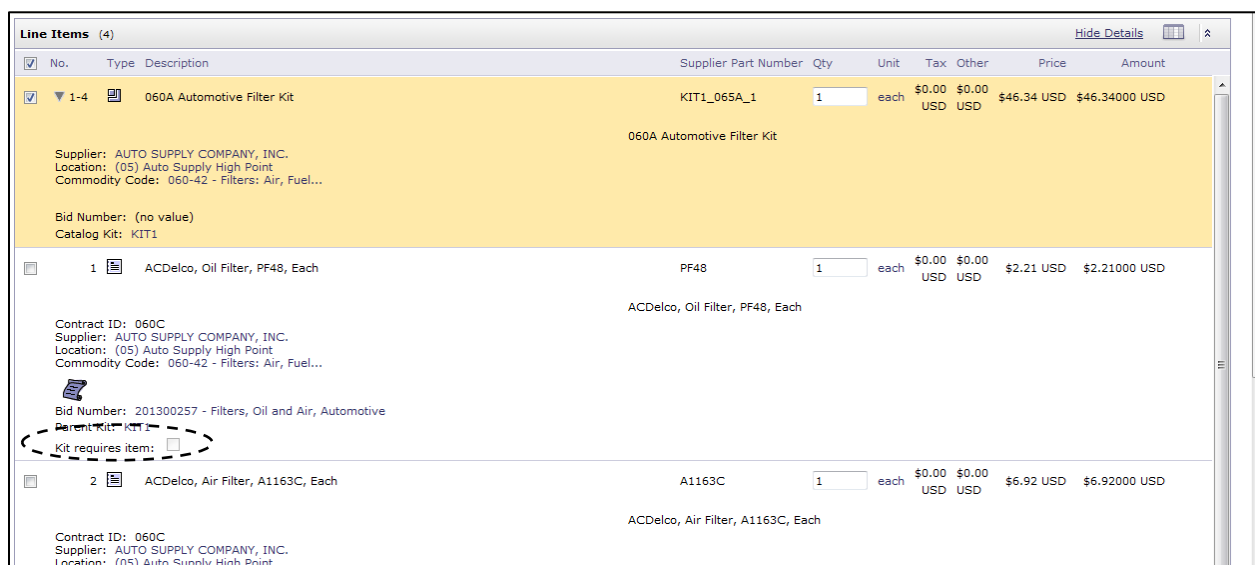
Supplier: AUTO SUPPLY COMPANY, INC.
Location: (05) Auto Supply High Point
Commodity Code: 060-42 - Filters: Air, Fuel...

Bid Number: (no value)
Catalog Kit: KIT1

[Edit](#) [Copy](#) [Delete](#) | [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$46.34000 USD [Update Total](#)

- Once the Catalog Kit is expanded, each line item will be visible. The **'Kit requires item'** checkbox will indicate whether the line is required for the Catalog Kit. If the **'Kit requires item'** box is checked, users will not be able to remove the line from the eRequisition.
- If the **'Kit requires item'** box is not checked, users may delete the line item by checking the box next to the line item and clicking **'Delete.'**



Line Items (4) [Hide Details](#)

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
<input checked="" type="checkbox"/> 1-4		060A Automotive Filter Kit	KIT1_065A_1	1	each	\$0.00 USD	\$0.00 USD	\$46.34 USD	\$46.34000 USD
060A Automotive Filter Kit									
Supplier: AUTO SUPPLY COMPANY, INC. Location: (05) Auto Supply High Point Commodity Code: 060-42 - Filters: Air, Fuel...									
Bid Number: (no value) Catalog Kit: KIT1									
<input type="checkbox"/> 1		ACDelco, Oil Filter, PF48, Each	PF48	1	each	\$0.00 USD	\$0.00 USD	\$2.21 USD	\$2.21000 USD
ACDelco, Oil Filter, PF48, Each									
Contract ID: 060C Supplier: AUTO SUPPLY COMPANY, INC. Location: (05) Auto Supply High Point Commodity Code: 060-42 - Filters: Air, Fuel...									
Bid Number: 201300257 - Filters, Oil and Air, Automotive									
Parent Kit: KIT1									
Kit requires item: <input checked="" type="checkbox"/>									
<input type="checkbox"/> 2		ACDelco, Air Filter, A1163C, Each	A1163C	1	each	\$0.00 USD	\$0.00 USD	\$6.92 USD	\$6.92000 USD
ACDelco, Air Filter, A1163C, Each									
Contract ID: 060C Supplier: AUTO SUPPLY COMPANY, INC. Location: (05) Auto Supply High Point									



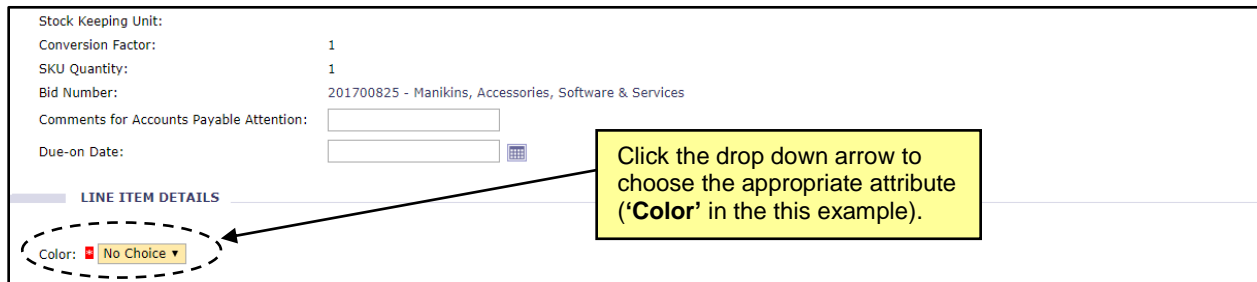
V. Catalog Item Enumeration


Enumerations are Statewide Term Contract items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the eRequisition (e.g., size, color, delivery options). When a user adds an Enumeration item to the eRequisition, the system displays the options for the user to choose. The user should select the preferred options and click 'OK' to add the item to the shopping cart.

1. Execute a keyword search and add the item to the eRequisition by clicking 'Add to Cart.' An additional screen will prompt users to select or enter additional information related to the selected item.


The screenshot shows the ARIBA Spend Management interface. At the top, there's a navigation bar with 'Home', 'Help', and 'Logout'. Below that, a search bar contains the text 'leg' and '785A' with a search button. The search results show two items: 'Left Leg Assembly - S100' and 'Right Leg Assembly - S100'. Both items are priced at \$42.00 USD and are supplied by GAUMARD SCIENTIFIC COMPANY. The 'Add to Cart' button for the 'Left Leg Assembly - S100' is circled in red. The interface also includes a 'Create Non-Catalog Item' button and a 'Refine your results' section on the left.

- In the **'Line Item Details'** section, click the drop down arrow next to the attribute to select a value.



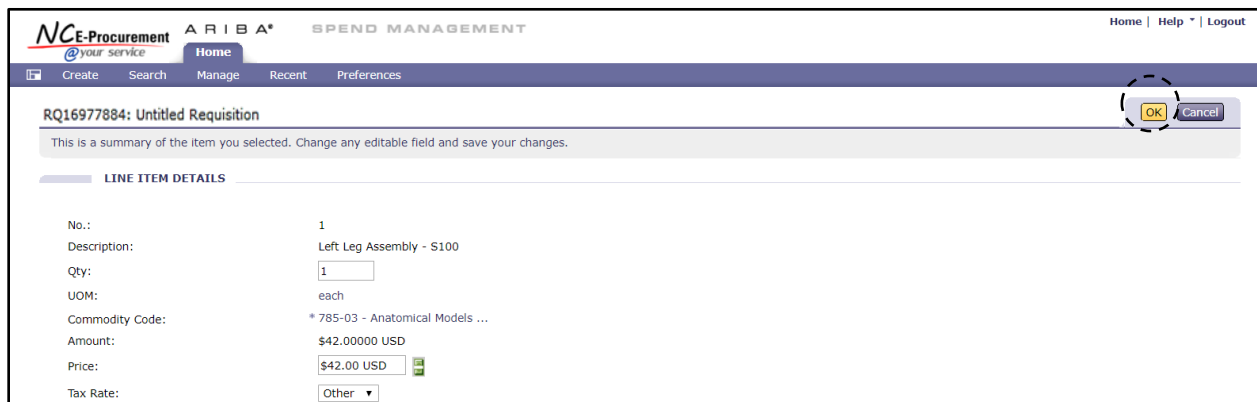
Stock Keeping Unit:
Conversion Factor: 1
SKU Quantity: 1
Bid Number: 201700825 - Manikins, Accessories, Software & Services
Comments for Accounts Payable Attention:
Due-on Date: 

LINE ITEM DETAILS

Color:  No Choice



Click the drop down arrow to choose the appropriate attribute ('Color' in the this example).

- Click **'OK'** to return to the **'Summary'** page.





NC E-Procurement @your service ARIBA* SPEND MANAGEMENT Home | Help * | Logout

Create Search Manage Recent Preferences

RQ16977884: Untitled Requisition  

This is a summary of the item you selected. Change any editable field and save your changes.

LINE ITEM DETAILS

No.: 1
Description: Left Leg Assembly - S100
Qty:
UOM: each
Commodity Code: * 785-03 - Anatomical Models ...
Amount: \$42.00000 USD
Price: 
Tax Rate: 

Note: The user will receive an error message if they try to submit an eRequisition without the Enumeration selected.



VI. Catalog Item Favorites

Users may add specific Statewide Term Contract items to a favorites list for quick reference. Catalog items saved as favorites are updated as the catalog item is updated (e.g., price, description). To utilize catalog Favorites, users must first define **'Favorites Folders.'** Specific catalog items can then be added to a defined Favorites Folder. If no folder is defined, any items marked as Favorites will be added to a folder named **'My Default Folder.'**

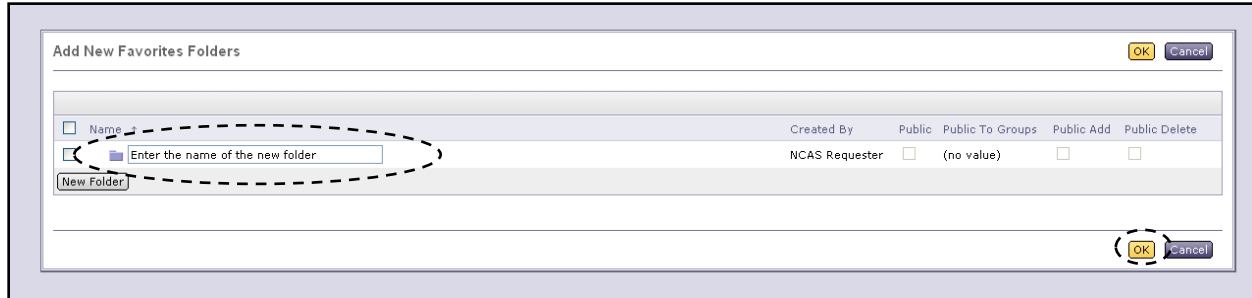
1. To define a Favorites Folder, execute a catalog search for the desired item.
2. Click the **'Add to Favorites'** link next to the item and select **'Organize Favorites.'**

The screenshot shows a search for 'paper' in the NCE-Procurement catalog. The search results are displayed in a table with columns for item name, price, quantity, and supplier. The first item is 'Paper, Bond, Recycled 100%, White, Boise Aspen ...' with a price of \$48.45 USD. The second item is 'PAPER FOR DIGITAL BP MONITOR PRINTER 6014P EA' with a price of \$3.44 USD. The 'Add to Favorites' link for the second item is highlighted, and a dropdown menu is shown with 'Organize Favorites...' selected.

3. Click **'New Folder.'**

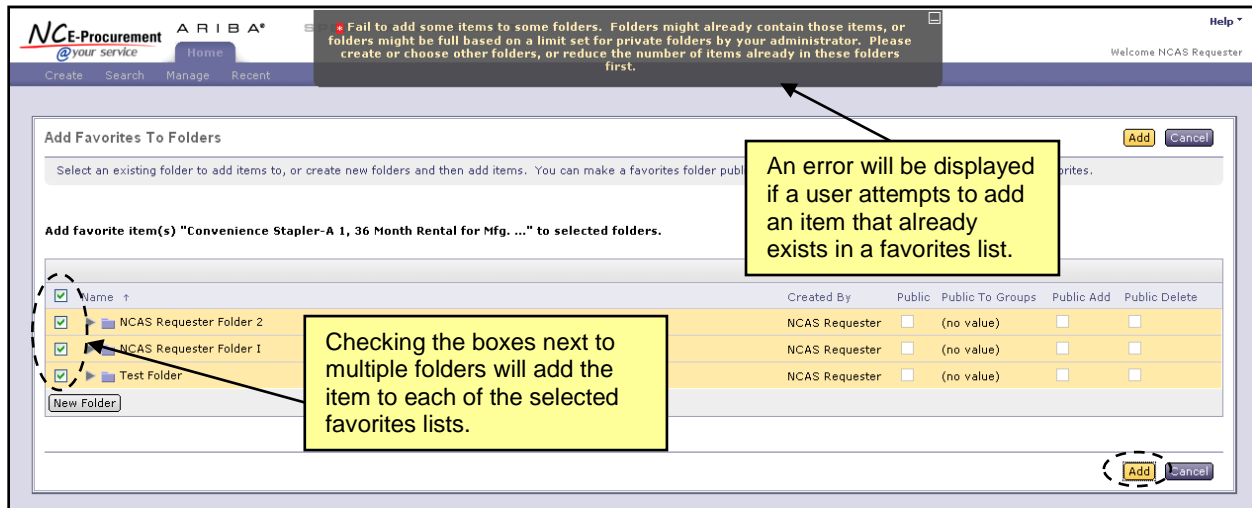
The screenshot shows the 'Organize Favorites' dialog box. The dialog box has a title bar 'Organize Favorites' and a 'Done' button. The main area contains a table with columns for Name, Created By, Public, Public To, Groups, Public Add, and Public Delete. The table is currently empty, and the 'New Folder' button is highlighted.

4. Enter the name of the folder in the available free-text field and click 'OK.'



The screenshot shows a dialog box titled "Add New Favorites Folders" with "OK" and "Cancel" buttons. It contains a table with columns: Name, Created By, Public, Public To Groups, Public Add, and Public Delete. A text input field in the "Name" column contains "Enter the name of the new folder" and is circled with a dashed line. A "New Folder" button is located below the table. Another "OK" and "Cancel" button pair is at the bottom right.

5. The same item may be added to multiple folders by checking the box next to each folder and clicking the 'Add' button. If the item already exists in a folder, the user will receive an error message.

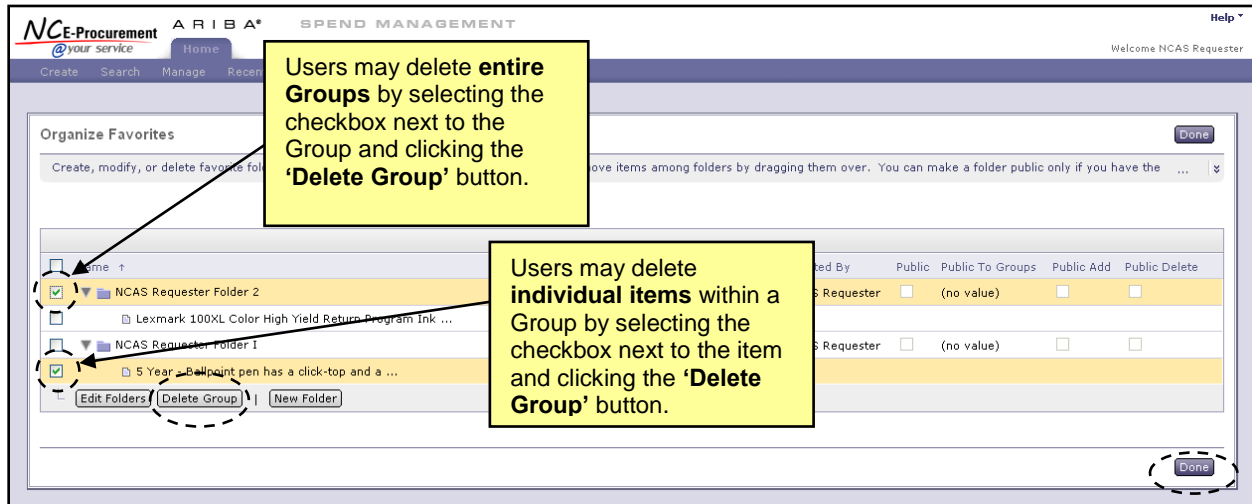


The screenshot shows the "Add Favorites To Folders" dialog box. At the top, a red error message states: "Fail to add some items to some folders. Folders might already contain those items, or folders might be full based on a limit set for private folders by your administrator. Please create or choose other folders, or reduce the number of items already in these folders first." Below the dialog, a table lists folders with checkboxes in the "Name" column. The "Name" column is circled with a dashed line. A yellow callout box points to the error message with the text: "An error will be displayed if a user attempts to add an item that already exists in a favorites list." Another yellow callout box points to the checked checkboxes with the text: "Checking the boxes next to multiple folders will add the item to each of the selected favorites lists." The "Add" and "Cancel" buttons are at the bottom right.

Name	Created By	Public	Public To Groups	Public Add	Public Delete
<input checked="" type="checkbox"/> NCAS Requester Folder 2	NCAS Requester	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> NCAS Requester Folder 1	NCAS Requester	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Test Folder	NCAS Requester	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>

- To make changes to favorites lists, a user may check the box next to the appropriate folder and click **'Edit Folders,' 'Delete Group,'** or **'New Folder.'** Once all necessary folders are updated, click **'Done.'**

Note: Clicking the **'Delete Group'** button will permanently delete an individual item within a folder or the entire folder and all of its saved contents. This action cannot be undone.



The screenshot shows the 'Organize Favorites' interface in the NC E-Procurement system. It features a list of folders and items with checkboxes for selection. Below the list are buttons for 'Edit Folders', 'Delete Group', and 'New Folder'. A 'Done' button is located at the bottom right. Two callout boxes provide instructions:

- Callout 1:** Users may delete **entire Groups** by selecting the checkbox next to the Group and clicking the **'Delete Group'** button.
- Callout 2:** Users may delete **individual items** within a Group by selecting the checkbox next to the item and clicking the **'Delete Group'** button.



- Users will be returned to the catalog search after clicking 'Done.'
- Now that the folder has been created, click 'Add to Favorites' next to the desired item and then 'Add To Folders...'

Refine your results

Keyword
peninsula (32)
table (30)
industry (19)
tiffany (19)
csii (19)
Show All ...

Category
285-58: Lighting ... (2)
287-78: Teaching ... (11)
360-10: Carpets and ... (1)
475-65: Pads, ... (2)
475-80: Syringes ... (1)
Show All ...

Supplier
FEEDBACK ... (1)
GREGORY POOLE ... (8)
MyOfficeProducts (1)
SOUTHERN ... (8)
XEROX CORPORATION (1)
Show All ...

Language
English (73)

Manufacturer
Bobcat (2)
DERMARITE ... (1)
Future-Tek (1)
SANFORD (1)
Tiffany Industries ... (19)
Show All ...

Price
\$1.00 - \$10.00 USD (2)
\$10.00 - \$100.00 USD (15)
\$100.00 - \$1,000.00 ... (39)
\$1,000.00 - \$10,000 ... (12)
\$10,000.00 - ... (1)
Show All ...

Favorites
Recent Choices -

Catalog Home
pen Search Options Create Non-Catalog Item

Supplier Part #:
Manufacturer Part #:
Contract ID:
Commodity Code:

Your search path: Catalog > "pen"

Supplier Punchout Catalog Resources

- MyOfficeProducts (1) Forms & Supply, Inc-FSIoffice (1) Piedmont Office Suppliers/Fais (1)
- MyOfficeProducts (Punchout Catalog) Forms and Supply (615A Punchout Catalog) Faison Office Product dba Piedmont Office Supplier

Shorten View

70 items found Show: 20 | 50 | 100 results per page Sort By: Relevance | Price | Name View: Details | Thumbnails

Add to Cart Compare Add to Favorites Page 1

Phaser 8560MFP: 30ppm Color Multifunction Iot, ...
\$1,136.69 USD
Qty:
Add to Cart Add to Favorites
Supplier: XEROX CORPORATION
Supplier Part #: 8560MFP/EN
Term Contract: 204D
Available in: 30 Day(s)
DIST
Phaser 8560MFP: 30ppm Color Multifunction Iot, Fax, Networking, 2400 Finepoint Image Quality, 512MB Memory, 40GB HD, 1X525 Letter/Legal Input Tray, Na Pwr Cord

5 Year - Ballpoint pen has a click-top and a ...
\$9.59 USD
Qty:
Add to Cart Add to Favorites Add To Folders... Organize Favorites...
Supplier: C.A. Short Company
Supplier Part #: SNC8001
Term Contract: 080A
Available in: 15 Day(s)
5 Year - Ballpoint pen has a click-top and a chrome finish. Includes State Seal on pen cap.

- Check the box next to the folder that will contain the item and click 'Add.'

Add Favorites To Folders Add Cancel

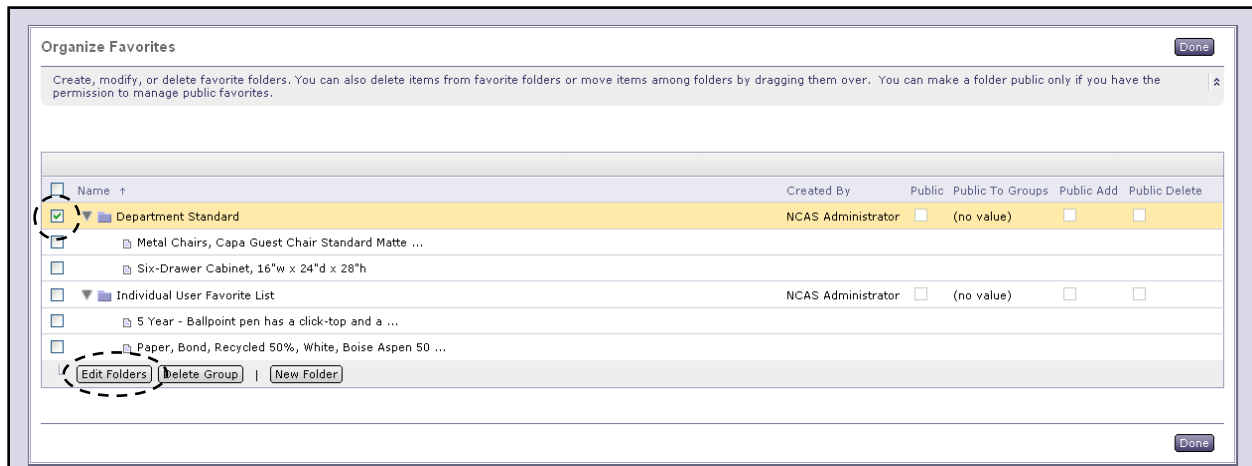
Select an existing folder to add items to, or create new folders and then add items. You can make a favorites folder public only if you have the permission to manage public favorites.

Add favorite item(s) "5 Year - Ballpoint pen has a click-top and a ..." to selected folders.

Name ↑	Created By	Public	Public To Groups	Public Add	Public Delete
<input checked="" type="checkbox"/> NCAS Requester Folder I	NCAS Requester	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="New Folder"/>					

Add Cancel

10. Users with 'NCAS Purchasing,' 'EPLite Purchasing,' and 'Non-Integrated Purchasing' roles will have the ability to check the **'Public'** box to publish a favorites list that will become an agency standard. Check the box next to the favorites list to become public, and then click the **'Edit Folders'** button.

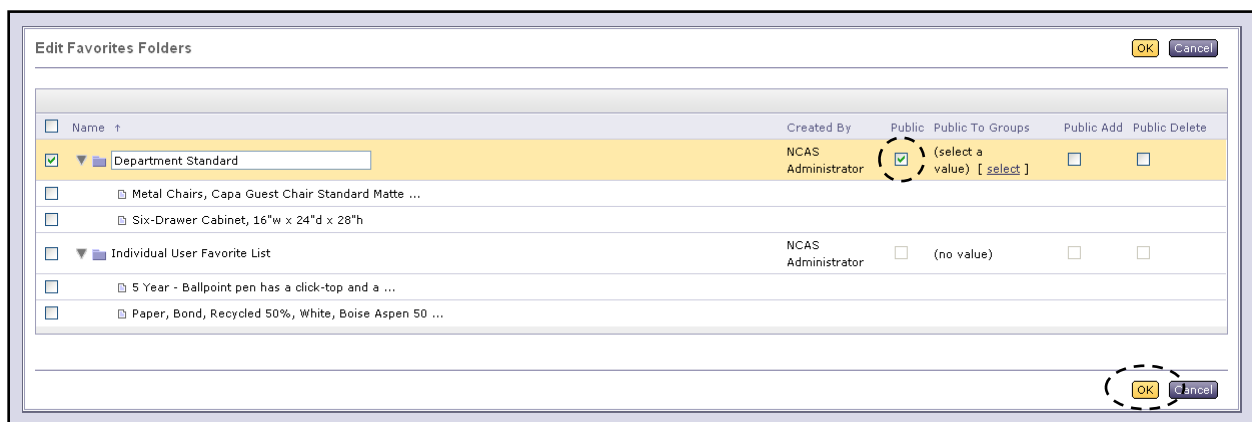


Organize Favorites

Create, modify, or delete favorite folders. You can also delete items from favorite folders or move items among folders by dragging them over. You can make a folder public only if you have the permission to manage public favorites.

Name	Created By	Public	Public To Groups	Public Add	Public Delete
<input checked="" type="checkbox"/> Department Standard <input type="checkbox"/> Metal Chairs, Capa Guest Chair Standard Matte ... <input type="checkbox"/> Six-Drawer Cabinet, 16"w x 24"d x 28"h	NCAS Administrator	<input checked="" type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Individual User Favorite List <input type="checkbox"/> 5 Year - Ballpoint pen has a click-top and a ... <input type="checkbox"/> Paper, Bond, Recycled 50%, White, Boise Aspen 50 ...	NCAS Administrator	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>

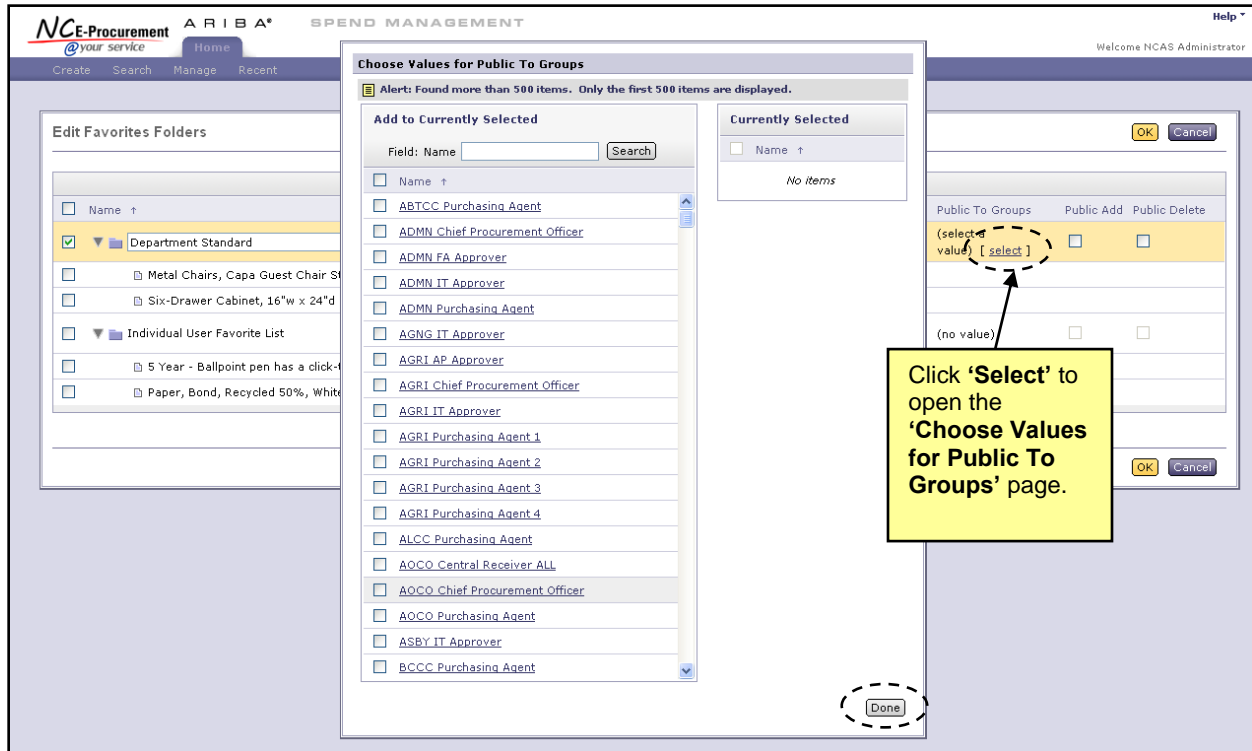
11. While in edit mode, check the **'Public'** box for the chosen favorites list and click **'OK.'**



Edit Favorites Folders

Name	Created By	Public	Public To Groups	Public Add	Public Delete
<input checked="" type="checkbox"/> Department Standard <input type="checkbox"/> Metal Chairs, Capa Guest Chair Standard Matte ... <input type="checkbox"/> Six-Drawer Cabinet, 16"w x 24"d x 28"h	NCAS Administrator	<input checked="" type="checkbox"/>	(select a value) [select]	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Individual User Favorite List <input type="checkbox"/> 5 Year - Ballpoint pen has a click-top and a ... <input type="checkbox"/> Paper, Bond, Recycled 50%, White, Boise Aspen 50 ...	NCAS Administrator	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>

12. Once a favorites list has been classified as public, the user must then choose which groups will have access to the published favorites list. They may do this by clicking **'Select'** under the **'Public To Groups'** column. The **'Choose Values for Public To Groups'** page will be displayed. Check the box next to the chosen group and click **'Done.'**



Choose Values for Public To Groups

Alert: Found more than 500 items. Only the first 500 items are displayed.

Add to Currently Selected

Field: Name Search

- Name ↑
- ABTCC Purchasing Agent
- ADMN Chief Procurement Officer
- ADMN FA Approver
- ADMN IT Approver
- ADMN Purchasing Agent
- AGNG IT Approver
- AGRI AP Approver
- AGRI Chief Procurement Officer
- AGRI IT Approver
- AGRI Purchasing Agent 1
- AGRI Purchasing Agent 2
- AGRI Purchasing Agent 3
- AGRI Purchasing Agent 4
- ALCC Purchasing Agent
- AOCC Central Receiver ALL
- AOCC Chief Procurement Officer
- AOCC Purchasing Agent
- ASBY IT Approver
- BCCC Purchasing Agent

Currently Selected

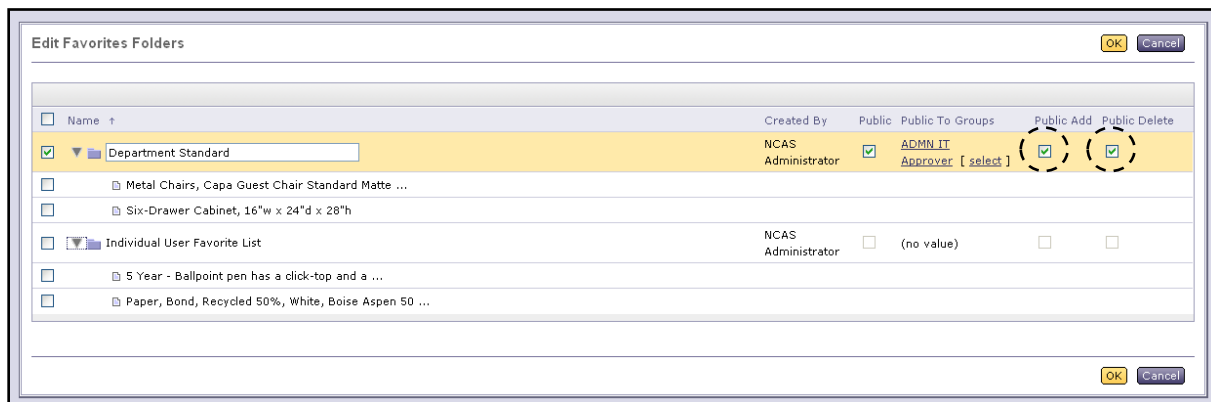
Name ↑

No items

Click **'Select'** to open the **'Choose Values for Public To Groups'** page.

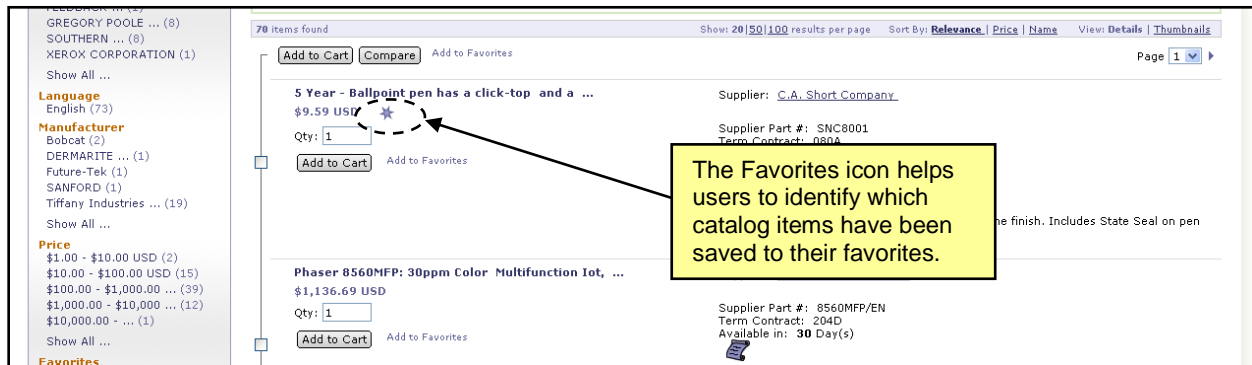
Done

13. Users with **'NCAS Purchasing,'** **'EPLite Purchasing,'** and **'Non-Integrated Purchasing'** roles will have the ability to check the **'Public Add'** and **'Public Delete'** boxes either independently or together. When these boxes are checked, users who have the ability to view the published favorites list will also be able to add items, delete items, or both.



Name ↑	Created By	Public	Public To Groups	Public Add	Public Delete
<input checked="" type="checkbox"/> Department Standard	NCAS Administrator	<input checked="" type="checkbox"/>	ADMN IT Approver [select]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Metal Chairs, Capa Guest Chair Standard Matte ...					
<input type="checkbox"/> Six-Drawer Cabinet, 16"w x 24"d x 28"h					
<input type="checkbox"/> Individual User Favorite List	NCAS Administrator	<input type="checkbox"/>	(no value)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 5 Year - Ballpoint pen has a click-top and a ...					
<input type="checkbox"/> Paper, Bond, Recycled 50%, White, Boise Aspen 50 ...					

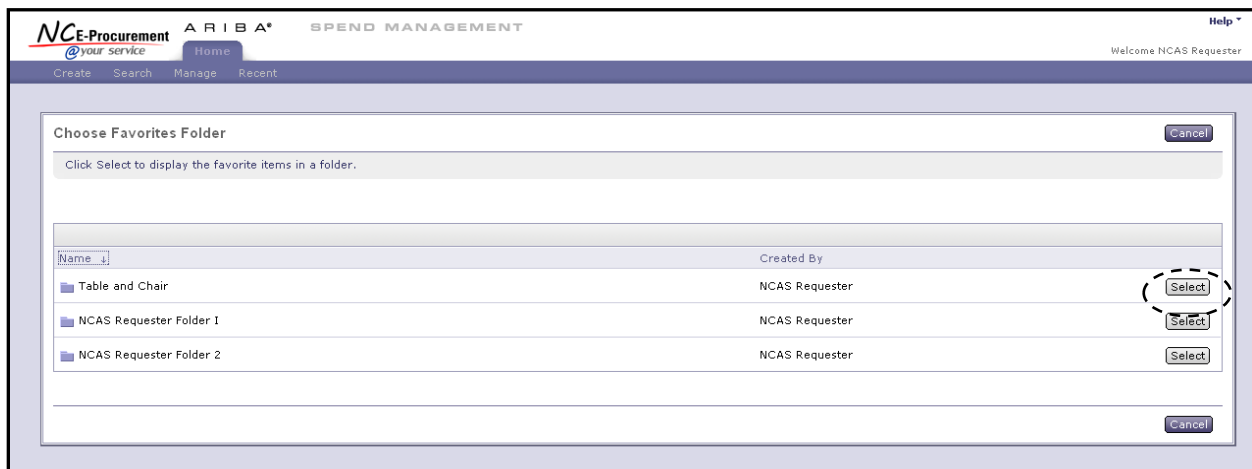
Note: Once the item has been added to the desired Favorite Folder, a star will appear next to the item to mark it as a Favorite.



Note: Users may view one of their Favorite Folders by clicking the 'Favorites' drop-down menu on the 'Catalog Home' page and choosing the appropriate one.



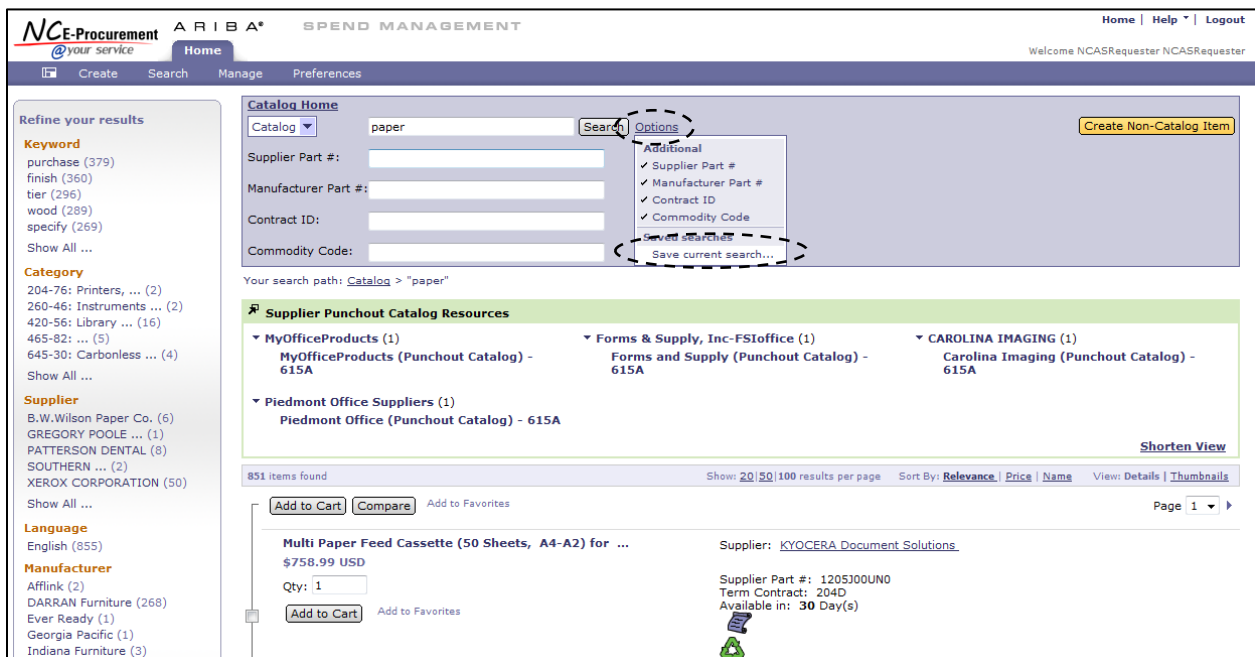
Note: Users may view all of their Favorites Folders by picking 'Other...' from the 'Favorites' drop-down menu. Clicking the 'Select' button for a folder will allow users to view all catalog items contained in that folder.



VII. Catalog Saved Searches

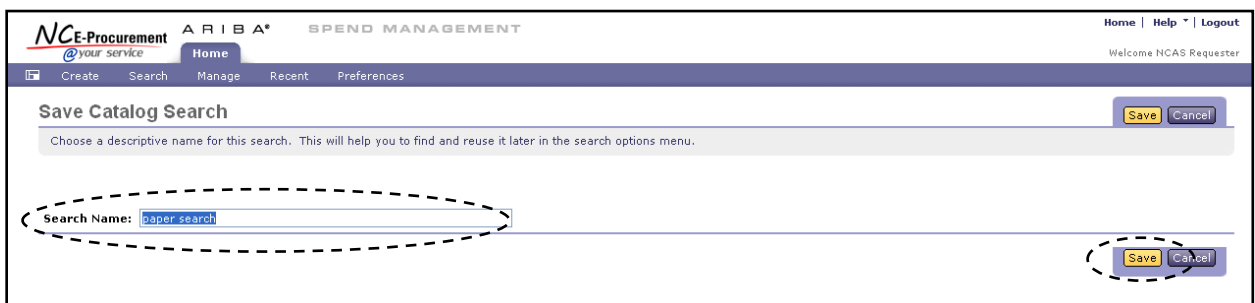
Users may save frequently used catalog searches for future reference. This can be helpful for users that add the same type of line items to an eRequisition on a regular basis.

1. From the **'Catalog Home'** page, users should run the catalog search using the same parameters as the search that they would like to be saved. The results will be displayed based on the requirements that the user has entered.
2. Click the **'Options'** link to view the list of available options for the search.
3. Click **'Save Current Search...'**



The screenshot shows the 'Catalog Home' page with a search for 'paper'. The 'Options' menu is open, showing a list of search criteria: Additional, Supplier Part #, Manufacturer Part #, Contract ID, and Commodity Code. The 'Save current search...' option is highlighted with a dashed circle. The search results show 851 items found, with a sample item 'Multi Paper Feed Cassette (50 Sheets, A4-A2) for ...' displayed.

4. In the **'Search Name'** field, enter the name of the search that is being saved.
5. Click the **'Save'** button. The catalog search is now saved and the user is returned to the **'Catalog Home'** page.



The screenshot shows the 'Save Catalog Search' dialog box. The 'Search Name' field contains the text 'paper search'. The 'Save' button is highlighted with a dashed circle. The dialog box also includes a 'Cancel' button and a brief instruction: 'Choose a descriptive name for this search. This will help you to find and reuse it later in the search options menu.'



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- To use a saved search, click the **'Options'** link from the **'Catalog Home'** page.
- Choose the saved search to execute under **'Saved Searches.'** The results for that search will be displayed.

Note: Saved searches save the search criteria to be executed, not specific catalog items. To save specific catalog items, refer to the **'Catalog Items Favorites'** section of this process document.

The screenshot displays the NCE-Procurement eRequisitioning interface. At the top, the header includes the NCE-Procurement logo, navigation links (Home, Help, Logout), and the user's name (Welcome NCAS Requester). The main navigation bar contains links for Create, Search, Manage, Recent, and Preferences. The page title is 'RQ16977884: Untitled Requisition' with a total value of \$0.00000 USD. The 'Catalog Home' section is active, showing search filters and a list of catalog categories. A dashed circle highlights the 'Options' dropdown menu, which includes 'Additional', 'Saved searches', and 'Run 'paper search''.

Supplier
B.W. Wilson Paper ... (6)
BLANKENSHIP ... (8)
D & H Distributing ... (30)
GREGORY POOLE ... (2130)
LEXMARK ... (1142)
Show All ...

Language
English (25029)

Favorites
- Recent Choices -

RQ16977884: Untitled Requisition Items: 0 Total: \$0.00000 USD [Summary](#) [Exit](#)

Add items to your requisition from the catalog or from your favorites groups. You can also enter details for non-catalog items.

Catalog Home Browse By: [Categories](#) | [Suppliers](#) [Create Non-Catalog Item](#)

Search **Options**

- Additional
 - ✓ Supplier Part #
 - ✓ Manufacturer Part #
 - ✓ Contract ID
 - ✓ Commodity Code
- Saved searches
 - Save current search
 - Run 'paper search'
 - Other

AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (1447)
AGRICULTURAL EQUIPMENT AND SUPPLIES (1447)
CHEMICALS (377)

APPLIANCES, ELECTRICAL, CLOCKS (10389)
APPLIANCES (3275)
ELECTRICAL EQUIPMENT (7114)

BUILDING MATERIALS, MAINTENANCE (3556)
BUILDING MATERIALS (3269)
JANITORIAL SUPPLIES AND EQUIPMENT (34)
PAINT AND PAINT MATERIALS (253)

CLOTHING & TEXTILE ITEMS (1240)
CARPET AND FLOOR MAINTENANCE AND MACHINES (1169)

MEDICAL & LAB EQUIPMENT & SUPPLIES (142)
LABORATORY EQUIPMENT AND SUPPLIES (58)
MEDICAL EQUIPMENT AND SUPPLIES (84)

OFFICE EQUIPMENT & SUPPLIES/PAPER/PRINTING (3042)
OFFICE EQUIPMENT AND SUPPLIES (2827)
PAPER AND PAPER PRODUCTS/PLASTICS (61)
PROMOTIONAL AND AWARD ITEMS (98)
PRINTING, PUBLICATIONS, EQUIPMENT AND SUPPLIES (56)

OIL & GAS
405-00: FUEL, OIL, GREASE AND LUBRICANTS (1)